

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: LEVEL OF SERVICE STANDARDS

ITEM NUMBER: 7

ATTACHMENT: 1

ACTION: _____

DATE OF MEETING: May 4, 2000

INFORMATION: X

PRESENTER(S): Michael Carter

EXECUTIVE SUMMARY

The Level of Service report provides the Benefits and Services Committee with the necessary information to fulfill its oversight responsibility regarding the delivery of benefits and services to CalSTRS members. The following reports for the month of March 2000.

I. Overview

- A. Fiscal Year Allowance Roll: CalSTRS paid a total of 162,495 benefit recipients \$279,686,211 in March 2000. The average monthly allowance roll for FY 1999/2000 is \$277,994,608. Total disbursements for FY 1999/2000 are \$2,501,951,470.
- B. Service Levels: All programs are performing within acceptable variance levels.
- C. Application Volume: An overall increase of ten percent in comparison to the same period last fiscal year.
- D. Interest Payments: The total interest payment volume for March 2000 increased five percent as compared to March 1999. The dollar amount of interest paid changed by zero percent.

II. Individual Program Reports: Pages 1-7

III. Miscellaneous Items: Pages 8 - 10

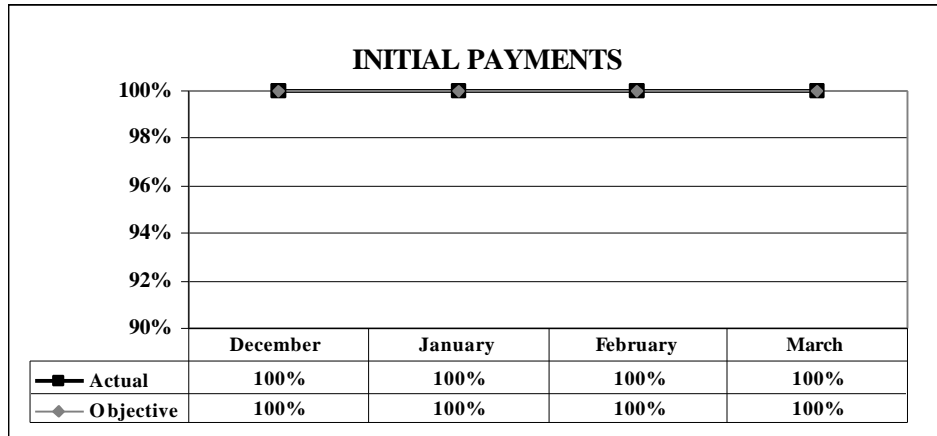
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Service Retirements

Objective Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.

Application Volume Change Plus eight percent in comparison to same period last fiscal year.

Baseline FY 1998/99 actual: 99 percent

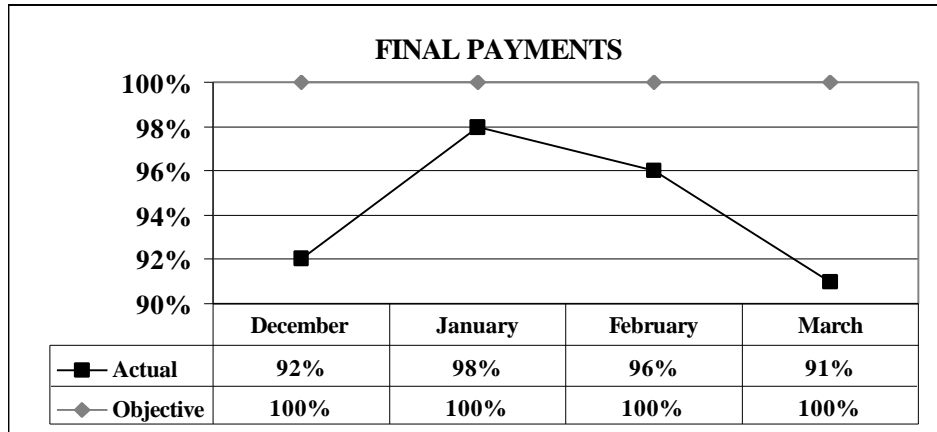


Year to Date Average: 99%

Objective Process 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.

Interest Payments July 1999 – March 2000
Number of Payments: 279
Dollar Amount: \$1,469

Baseline FY 1998/99 actual: 98 percent

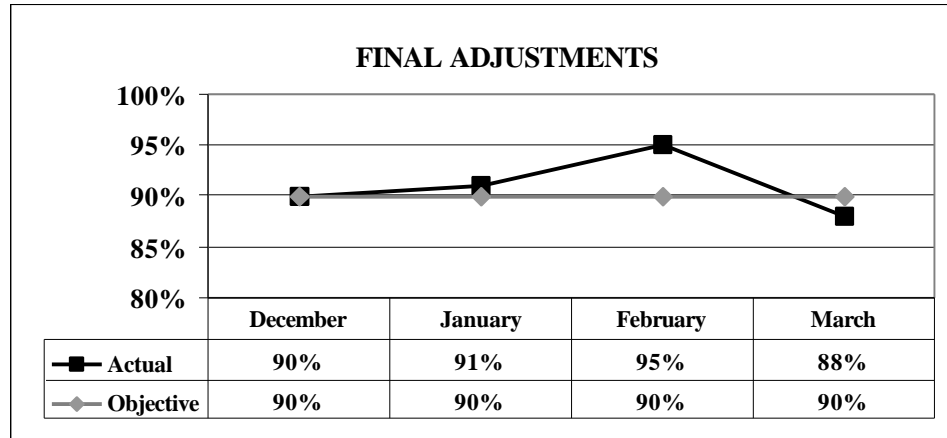


Year to Date Average 96%

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Service Retirements

Objective Finalize 90 percent of all payments within four months of the retirement effective date.



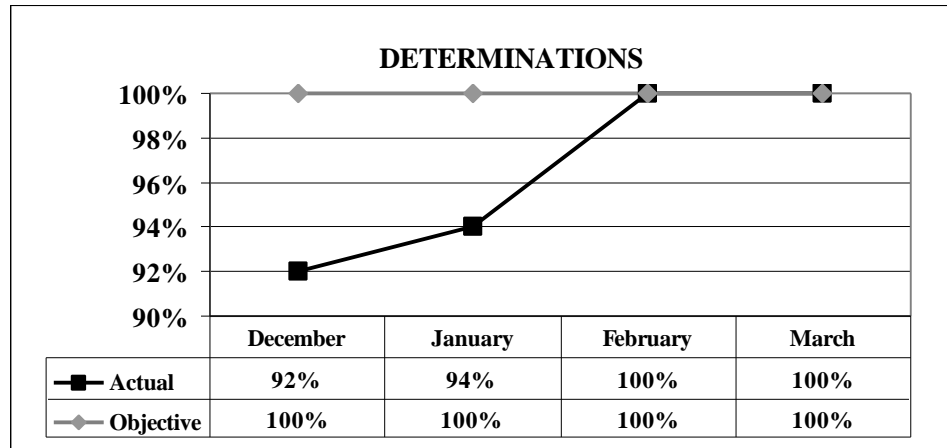
Baseline FY 1998/99 actual: 91 percent

Year to Date Average: 92%

Disability

Objective Process 100 percent of all eligible applications within 180 days of receipt.

Application Volume Change Plus eighteen percent in comparison to same period last fiscal year.



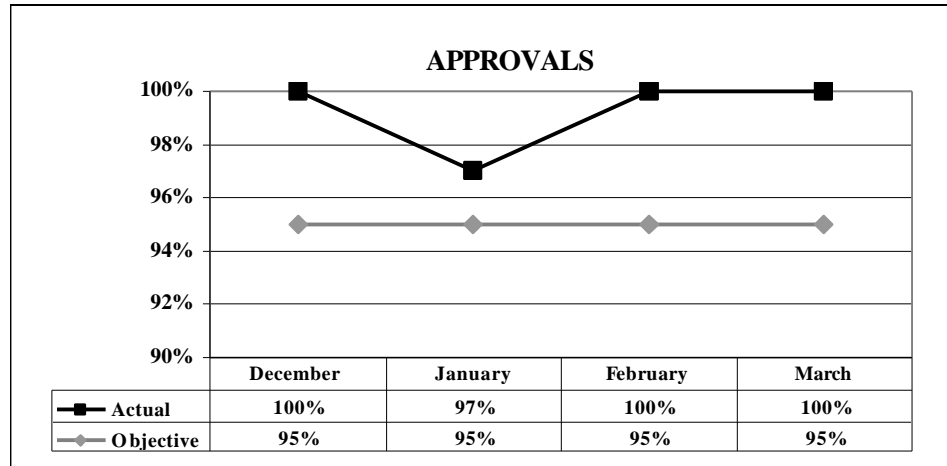
Baseline FY 1998/99 actual: 99 percent

Year to Date Average: 98%

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Disability

Objective Process 95 percent of all approvals within 30 days of receipt of all necessary information.

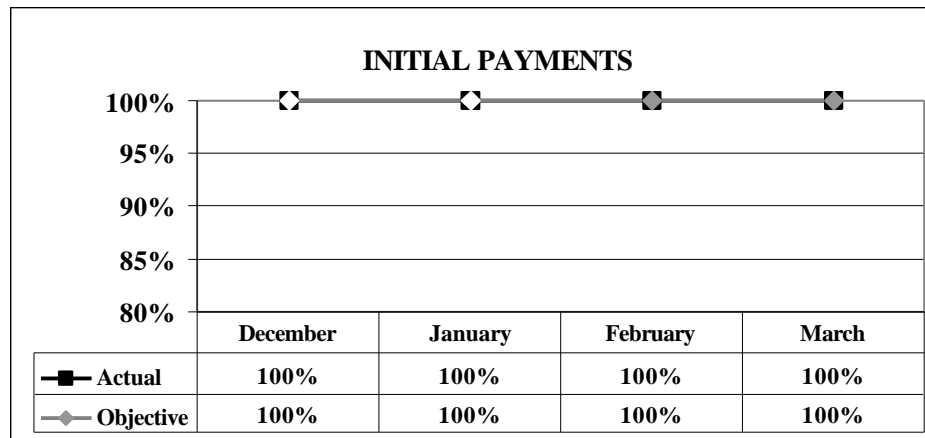


Baseline FY 1998/99 actual: 100 percent

Year to Date Average: 99%

Objective Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.

Interest Payments July 1999 – March 2000
Number of Payments: 0
Dollar Amount: \$0



Baseline FY 1998/99 actual: 100 percent

Year to Date Average: 100%

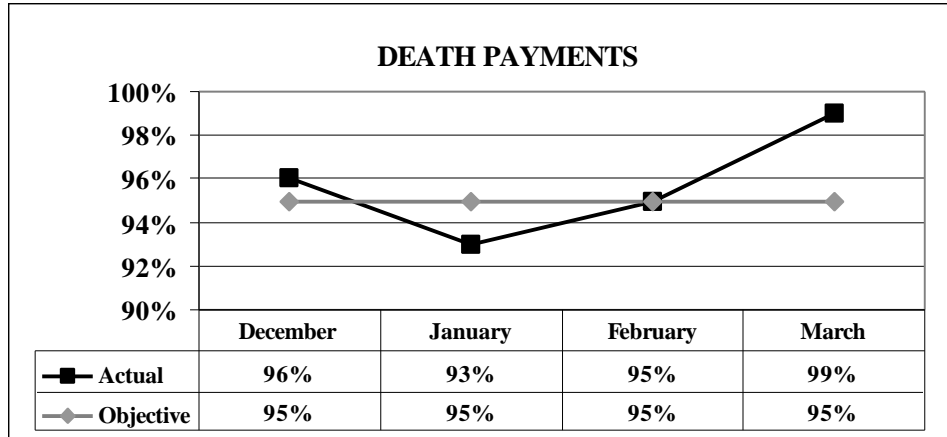
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Survivor Benefits

Objective Process 95 percent of all applications within 30 days of receipt of all necessary information.

Application Volume Change Twelve percent increase in comparison to same period last fiscal year.

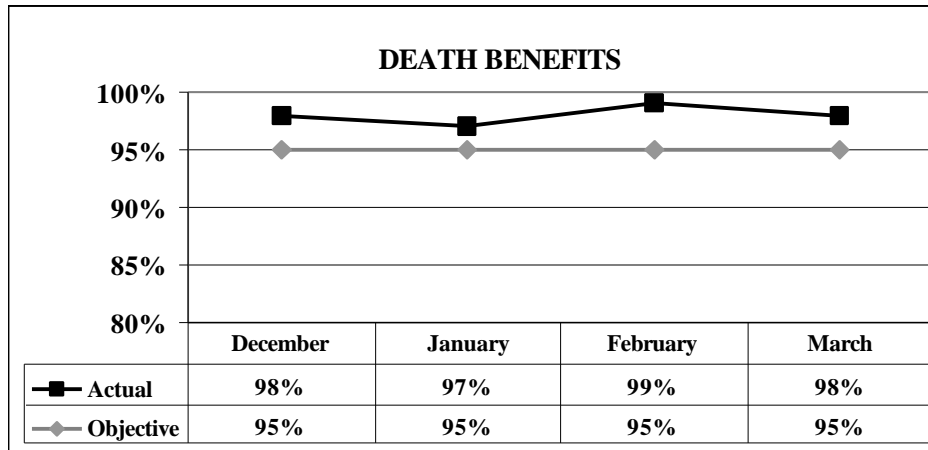
Interest Payments July 1999 – March 2000
Number of Payments: 146
Dollar Amount: \$11,579



Baseline FY 1998/99 actual: 97 percent

Year to Date Average: 97%

Objective Complete 95 percent of all payments for retired members within 90 days of receipt of notification of death.



Baseline FY 1998/99 actual: 93 percent

Year to Date Average: 97%

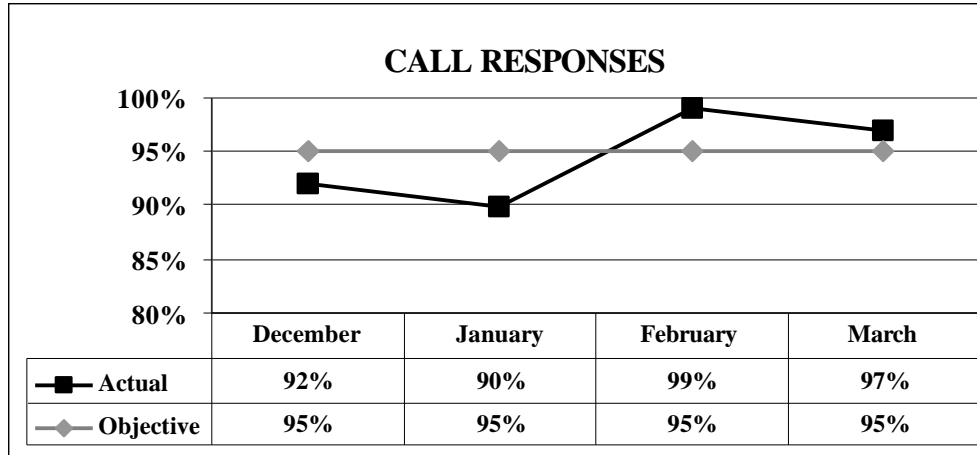
CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Public Service

Objective Answer 95 percent of all calls in less than three minutes.

Volume Change -10.04 percent decrease.

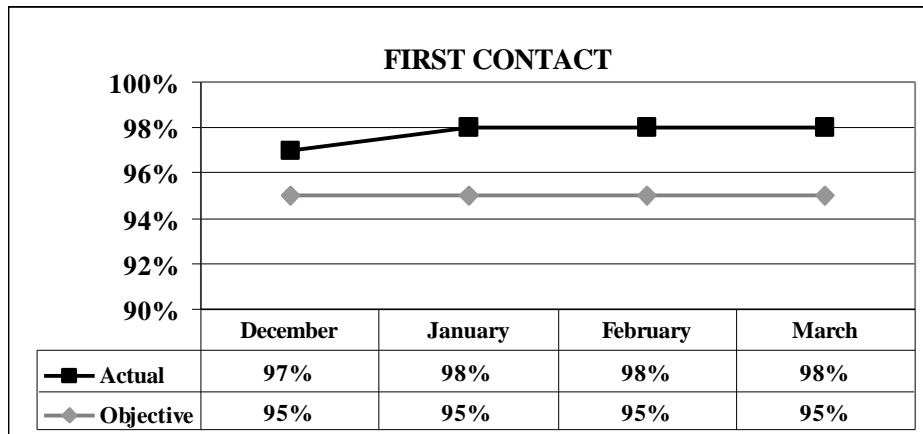
Notes Average queue time: 39 seconds
Longest queue wait: nine minutes



Baseline FY 1998/99 actual: 94 percent
FY 1996/97 Objective:
75 percent/less than three minutes.

Year to Date Average: 92%

Objective Answer 95 percent of all calls on the first contact.



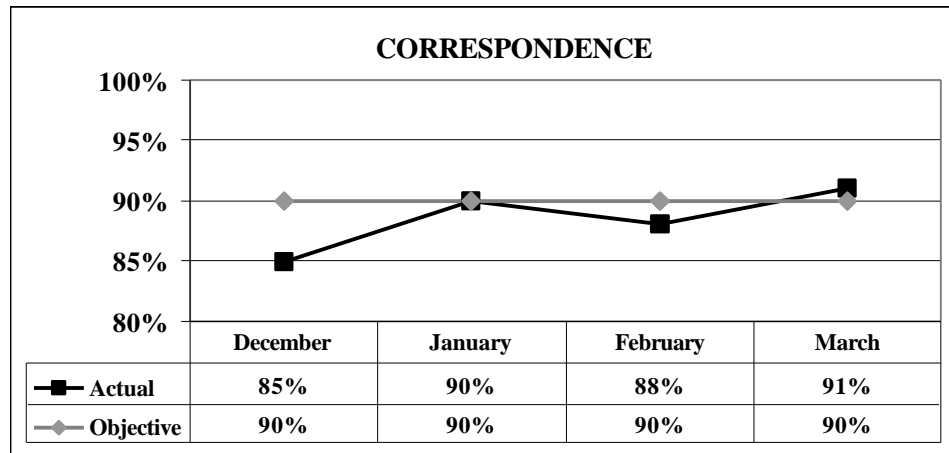
Baseline FY 1998/99 actual: 98 percent

Year to Date Average: 97%

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

Public Service

Objective Respond to 90 percent of all correspondence in ten working days.

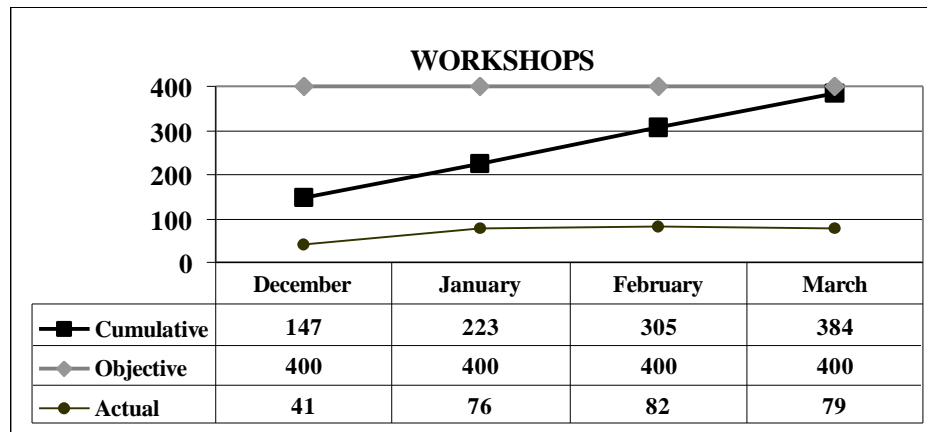


Baseline FY 1998/99 actual: 94 percent

Year to Date Average: 92%

Regional Counseling Services

Objective Conduct 400 workshops

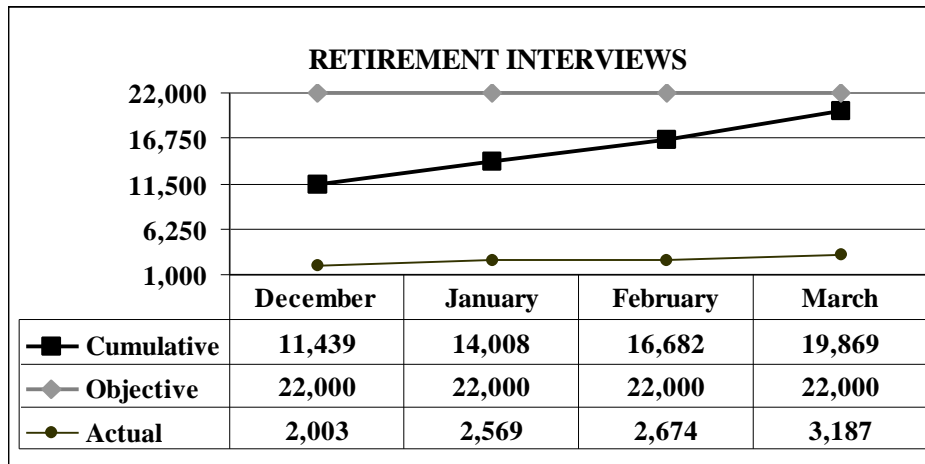


Baseline FY 1998/99 actual: 491

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

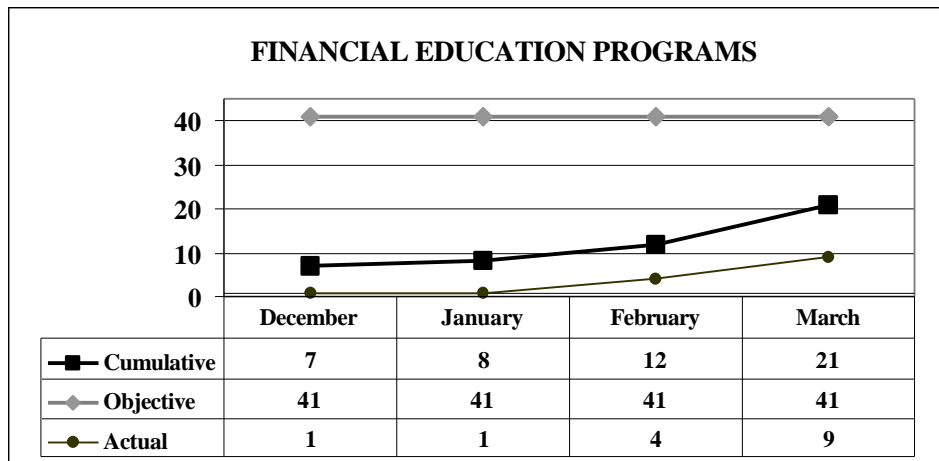
Regional Counseling Services

Objective Provide 22,000 retirement interviews.



Baseline FY 1998/99 actual: 24,657

Objective Deliver 41 Financial Education Program to CalSTRS members.

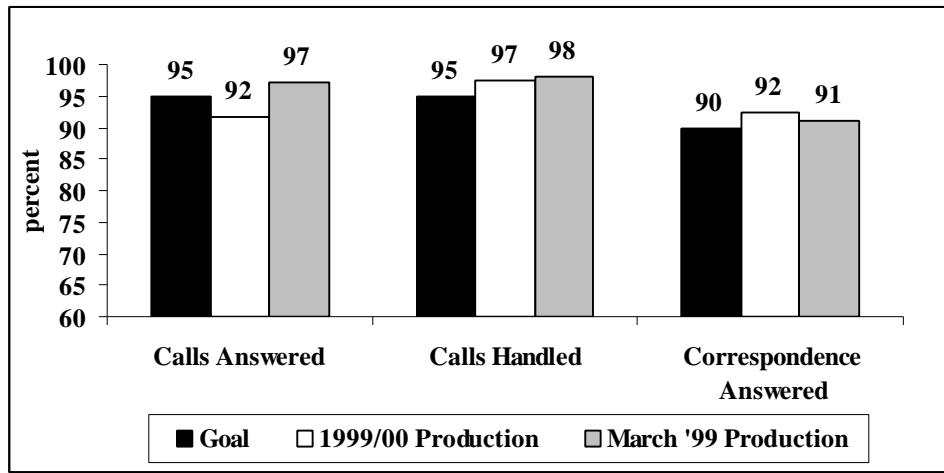


Baseline FY 1998/99 actual: 32

CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

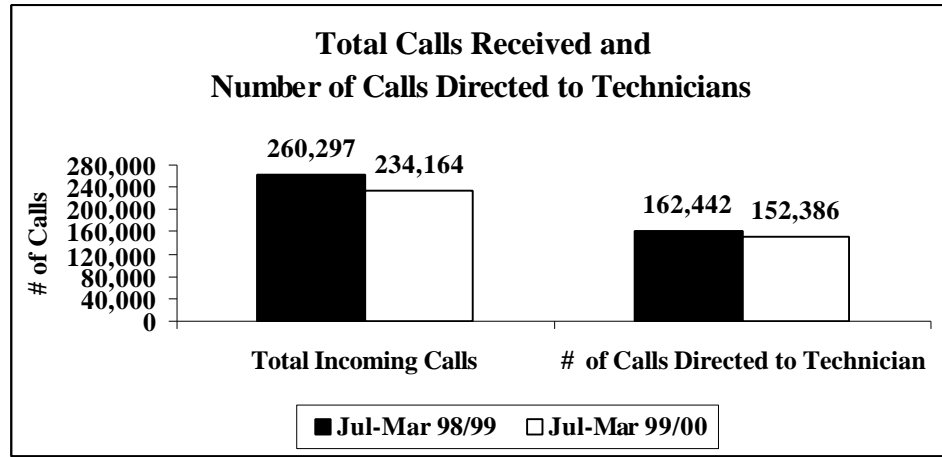
III. Miscellaneous

- A. Outstanding Survivor Benefit Cases:** The Education Code requires a report to the Board on outstanding Survivor Benefit cases not paid within six months of the notification of death. As of March 2000, there were 114 cases exceeding this threshold. In February 2000, there were 105 cases beyond the six-month processing period, while in January 2000, there were 91 cases exceeding the six-month threshold.
- B. One-Year Final Compensation:** During the current fiscal year, two new schools have chosen to participate in this program.
- C. Golden Handshake:**
- | | |
|-------------------|----------------------------------|
| July - March 1999 | 189 districts / 205 participants |
| July - March 2000 | 88 districts / 138 participants |
- D. Telephone Center:**



CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

D. Telephone Center: (continued)



Type	(1) Benchmark 90/91	(2) July-Mar 98/99	(3) July-Mar 99/00	% of Change $\frac{(3) - (2)}{(2)}$	March 2000
Total Incoming Calls	195,858	260,297	234,164	-10.04%	33,625
Technician Calls	117,913	162,442	152,386	-6.19%	21,453
Automated Attendant Calls	31,895	68,086	55,804	-18.04%	9,589
Teletalk Calls	46,050	29,769	25,974	-12.75%	2,583